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In the U.S. and Mexico, broiler meat overtakes beef as the primary meat consumed, with consumption increasing over the baseline, reaching 45.19 and 25.87 kg per person respectively in 2011. The broiler sector benefited from SPS challenges for other meats. Broiler trade increases by 2.24 tmt in the next decade, or 4.48% annually, reaching 7.22 mmt in 2011.

Availability of improved technologies and production inputs raises world broiler production by 10.3 mmt, or 2.36% annually, culminating in a level of 54 mmt in 2011. As a result, the impact on price of the long-run shift toward poultry consumption is alleviated.

SPS challenges for the other meats result in a high broiler price of \$59.15 per cwt at the start of the decade. Strong demand continues to strengthen prices at a rate of 0.90% annually, with the price in 2011 at \$61.91, approaching the decade's peak in 1998.

Japanese imports recover by 2.30% annually, reaching 836 tmt in 2011. Avian flu dampens consumption growth in Hong Kong.

Forecast World Broiler Meat Trade Net Importers

(Thousand Metric Tons)

	2002	2003	2004	2005	2006	2007	2008			
China - Mainla	and									
	505	512	569	640	727	838	951			
China - Hong Kong										
	248	251	255	258	262	265	268			
Japan	680	699	716	733	753	772	787			
Mexico	245	262	296	323	350	345	338			
Russia	1,070	1,082	1,109	1,113	1,134	1,153	1,168			
Saudi Arabia	386	406	432	453	477	502	525			
Source: FAPRI 2002 Outlook										

Economic and population growth spurs imports in South Korea, Indonesia, and Philippines to increase from 94 to 259 tmt over the baseline.

Brazil gains 10 percentage points of market share. Driven by its depreciating currency and new production investments in the grainrich Center-West region, Brazil expands its production and exports by 4.06% and 9.78%, respectively.

Productivity improvements, product innovation, and a shift to highervalued products enable Thailand to maintain its market share despite the presence of low-cost competitors and an appreciating currency.

Under WTO accession, the tariff for poultry is the lowest among all meat products in China. Complementary demand for broiler parts and lower tariff rates boost chicken imports by 8.01%, culminating in 1.17 mmt of imports in 2011.

Taiwan's chicken import quota of 12 tmt was maintained with a heavy penalty on excess imports. With WTO accession, Taiwan is expected to remove its quota and replace it with a tariff. As a result, imports increase by 23.89%, reaching 108 tmt in 2011.

Forecast World Broiler Meat Trade Net Exporters

(Thousand Metric Tons)										
2002	2003	2004	2005	2006	2007	2008				
1,300	1,524	1,683	1,842	1,951	2,045	2,186				
2,869	2,919	3,029	3,098	3,226	3,371	3,423				
5,165	5,435	5,683	5,929	6,176	6,419	6,614				
U.S. 12-City Price (U.S. Dollars per Metric Ton)										
1,306	1,315	1,323	1,325	1,320	1,317	1,330				
	2002 1,300 2,869 5,165 rice (U.S	2002 2003 1,300 1,524 2,869 2,919 5,165 5,435 rice (U.S. Dolla	2002 2003 2004 1,300 1,524 1,683 2,869 2,919 3,029 5,165 5,435 5,683 rice (U.S. Dollars per M	2002 2003 2004 2005 1,300 1,524 1,683 1,842 2,869 2,919 3,029 3,098 5,165 5,435 5,683 5,929 rice (U.S. Dollars per Metric T	2002 2003 2004 2005 2006 1,300 1,524 1,683 1,842 1,951 2,869 2,919 3,029 3,098 3,226 5,165 5,435 5,683 5,929 6,176 rice (U.S. Dollars per Metric Ton)	2002 2003 2004 2005 2006 2007 1,300 1,524 1,683 1,842 1,951 2,045 2,869 2,919 3,029 3,098 3,226 3,371 5,165 5,435 5,683 5,929 6,176 6,419				

China's Broiler Production Grows as Producers Focus on Exports and The Domestic Market

China's broiler imports are forecast to remain flat through 2002 as domestic producers will likely supply a greater share of the home market. Broiler production in 2002 is forecast to increase nearly 4 percent to 5.4 million tons as the broiler industry becomes more sophisticated. China's broiler industry is focusing on the huge domestic market as well as foreign markets, particularly the EU and African destinations. In 2002, exports are expected to grow despite last year's set backs caused by trade disputes with Japan and South Korea. Broiler consumption is forecast to increase 3 percent to 5.8 million tons in 2002. In 2001, direct U.S. exports of broilers to China, the seventh largest market for the United States, were valued at \$33 million. However, U.S. broiler exports to Hong Kong, for direct consumption there and re-exports to China, accounted for an additional \$335 million.

China's Broiler Situation

	1996	1997	1998	1999	2000	2001(p) 2	2002(f)	Imports	- Chicken	Parts				
	((1,000	tons re	ady to	cook ec	_l uivalent))	Origin	1996	1997	1998	1999	2000	2001
Production	5,000	2,650	3,450	4,400	5,050	5,200	5,400	Brazil	23,376	24,421	14,470	30,950	52,392	49,040
Imports	633	677	701	881	953	900	900	EU-15	70,753	72,441	90,760	86,478	74,815	56,146
Consumption	5,315	2,996	3,828	4,906	5,539	5,611	5,791	US	469,009	244,472	244,433	374,985	387,455	275,808
Exports	318	331	323	375	464	489	509	Total	631,961	395,908	426,129	588,129	599,804	471,947
								US marl	ket share					
Source: USDA	/FAS								74%	62%	57%	64%	65%	58%

	Y 02, 2002		INTERNA	TIONAL EGG	& POULTRY REVIEW		VOL. 05 NO. 27			
Inspected Egg					LIVE POULTRY SLTR				22-Jun-02	
U.S. Exports to					(PRELIMINARY)			HTERED DOM	ESTICALLY	
Week Ending .			Year-To-			_	IGHT	HEAVY	TOTAL	
	2002	2001 /1	2002	2001		I	HENS	HENS	HENS	
Liquid	347	174	8,656	5,398	-			HOUSANDS-		
Frozen	21	0	21	40	HEAD		1,703	1,517	3,220	
Dried	0	18	190	40	LAST WEEK		1,699	1,529	3,228	
Total	368	192	8,867	5,478	SAME WEEK YR AGO		1,822	1,553	3,375	
U.S. Imports F					TO-DATE/2002		5,503	33,351	78,854	
Week Ending .			Year-T		TO-DATE/2001		1,857	33,596	78,453	
	2002	2001/1	2002	2001	U.S. FOWL SLAUGH	TERED IN CA	NADA			
Liquid	160	248	2,631	2,638			GHT	HEAVY	TOTAL	
Frozen	18	11	1,610	638		Н	ENS	HENS	HENS	
Dried	80	0	2,158	301	_			OUSANDS—		
Total	258	259	6,399	3,577	HEAD		402	0	402	
Inspected She					LAST WEEK		438	7	445	
U.S Exports To			ses (Prelimii	nary)	SAME WEEK YR AGO)	506	7	513	
Week Ending .	June 22, 2002	2	Year-To	o-Date	TO-DATE/2002	8	3,152	38	8,190	
	2002	2001 /1	2002	2001	TO-DATE/2001	12	2,166	192	12,358	
Jumbo	30	0	1,155	87	SOURCE: AGRICULT	FURE CANA	DA, PL1	TRY DEVELO	PMENT DIV.	
Extra Large	150	1,717	12,694	23,022	TOTAL U.S. FOWL SI	LAUGHTERE	D IN TH	HE U.S. AND C	ANADA	
Large	2,634	2,889	53,526	57,383		LI	GHT	HEAVY	TOTAL	
Medium	960	840	23,197	22,028		Н	ENS	HENS	HENS	
Ungraded	10,850	13,230	175,855	165,860	_		——TH	OUSANDS-		
Misc	0	3,800	11,224	40,904	HEAD	2	2,105	1,517	3,622	
Total	14,624	22,476	277,651	309,284	LAST WEEK		2,137	1,536	3,673	
/1 Comparable	Week, to-dat	e figures ma	y not total du	ie to	SAME WEEK YR AGO		2,328	1,560	3,888	
rounding.	•	J	•		TO-DATE/2002		3,655	33,389	87,044	
Source: USDA	/AMS Poultry	Programs, M	larket News E	Branch in	TO-DATE/2001		7,023	33,788	90,811	
cooperation wi					SOURCE: USDA/AM					
CENTRAL REG F.O.B. SHIPPE FOR MECHAN REGION IN TR	R DOCK OR E	EQUIVALEN			EASTERN REGION M					
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210 WALNUT STREET, ROOM 951, DES MOINES, IOWA, 50309 515/284-4471 FAX 515/284-4468 Visit us on the World Wide Web at http://www.ams.usda.gov/marketnews.htm

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 28 JUNE 2002.

The domestic and export markets slow with trading consisting of fill in basis for pre-holiday needs. The export market continued to be cautious and selective with little interest to own product materializing. Bulk parts undertone was steady to instances weak. Tom breast meat steady with some increased availability noted. Bulk parts offerings were mixed due to the upcoming holiday and varied slaughter schedules. Hen bulk parts was mostly steady with some reporting limited increase in availability. Fresh wing meat traded at 59 cents, 12-14 lb. Grade A non-basted breasts and 14-16 lb. both 112 cents.

FRIDAY, JUNE 28, 2002 EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS		R	24.00	80	24.72	187
WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM		W	22.50	40	22.50	40
TAILS	16.00-17.00		16.65	616	16.65	616
MECHANICALLY SEPARATED 2/		W	18.50	80	18.50	80
THIGH MEAT - FROZEN	44.50		44.50	400	47.09	671
THURSDAY, JUNE 27, 2002						
EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
DRUMSTICKS, TOMS	24.00		24.00	80		
WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM		W	22.50	40		
TAILS		R	18.00	400		
MECHANICALLY SEPARATED 2/		W	18.50	80		
THIGH MEAT - FROZEN	47.00		47.00	104		
WEDNESDAY, JUNE 26, 2002						
EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS		T	26.00	27		
WINGS FULL-CUT - TOMS WINGS, V-TYPE, TOM	22.50		22.50	40		
TAILS		R	18.00	400		
MECHANICALLY SEPARATED 2/	18.50	_	18.50	80		
THIGH MEAT - FROZEN		Т	53.00	67		
TUESDAY, JUNE 25, 2002						
EXPORT TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)		
DRUMSTICKS, TOMS	26.00		26.00	27		
WINGS FULL-CUT - TOMS		F	23.15	172		
WINGS, V-TYPE, TOM		Т	30.50	208		
TAILS		R	18.00	400		
MECHANICALLY SEPARATED 2/	50.00	F	17.00	52		
THIGH MEAT - FROZEN	53.00		53.00	67		
MONDAY, JUNE 24, 2002 EXPORT TRADING	PRICE	L.S.T.	WTD AVG	VOLUME		
DRI METICKE TOME	RANGE	CODE 1/	PRICE	(000)		
DRUMSTICKS, TOMS WINGS FULL-CUT - TOMS	25.00	F	25.00 23.15	80 172		
WINGS, V-TYPE, TOM		r T	30.50	208		
TAILS		R	18.00	400		
MECHANICALLY SEPARATED 2/		F	17.00	52		
THIGH MEAT - FROZEN	52.00-60.00	-	53.60	100		
1/CODES FOR LAST SIGNIFICANT		I MONDAY T			JUDODAV E EDI	DAV2/

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY 2/ Product contains 15-20% fat with skin added.